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1 Introduction

InTouch is an Outlook Add-In user application which runs on the user's Windows based PC and integrates Outlook, MSN, Yahoo! and Skype with Avaya IP Office Call Management and Control. It enables the user to optimize communications by providing consolidated presence information and by presenting a variety of communication options such as voice, email, SMS and Instant Messaging (IM).

InTouch offers direct one-touch interaction between a user's telephony, email, calendar and IM, bringing together the most popular forms of communications. ***InTouch*** improves user productivity and simplifies communications.

This document details the work flows and features that are part of the ***InTouch*** application.

1.1 Trademarks

Microsoft Exchange, Microsoft Outlook, .Net framework, Windows Installer, Windows Live Messenger, Windows XP, Windows Vista & Windows 7, associated trademarks are products of Microsoft Corporation

Skype, associated trademarks, logos and the "S" symbol are trademarks of Skype Limited.

Yahoo! & Yahoo Messenger, associated trademarks and logos are trademarks of Yahoo! Inc.

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2 Minimum Requirements

Operating system:

- Windows XP Professional SP3
- Windows Vista SP2 Business, Ultimate or Enterprise (32 OR 64 bit)
- Windows 7 Professional, Ultimate or Enterprise (32 OR 64 bit)

.Net framework:

- Framework 3.5 Service Pack 1 – available from the Microsoft website

Microsoft Outlook: (32 bit only)

- 2003
- 2007
- 2010

Microsoft Exchange:

- 2003
- 2007
- 2010

Skype (optional):

- 3.8.0.188 or later

Windows Live Messenger (optional):

- 14.0 or later

Yahoo! (optional):

- 10.0 or later

Avaya IP Office:

- Release 6.0 or later

NOTE: In order for the *InTouch* client to work with TAPI correctly, the *InTouch* client must always be associated to a registered and active phone

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Windows Installer:

- Windows Installer 3.1

Hardware Recommendation in addition to the base Operating System requirements, ***InTouch*** requires:

- 1 GHz 32-bit (x86) or 64-bit (x64) processor
- 1 GB of system memory
- At least 20 MB of available hard drive space for installation; and an additional 10 MB of available hard drive space for configuration and cached contact data. Note: the space requirement for configuration and cache will vary dependent upon the number of contacts to be displayed.
- A Network Connection. 10Mb/s minimum

NOTE: These hardware requirements encompass those requirements of the prerequisite software listed in the previous section.

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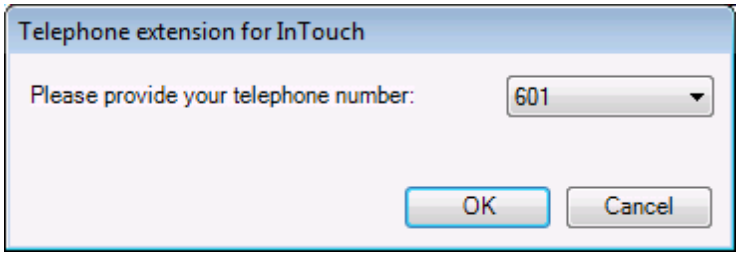
3 First Run

If no ***InTouch*** license is available, ***InTouch*** will run in trial mode for 7 days. Any valid license that is available, will override the 7 day trial.

When running ***InTouch*** for the first time, the user must select their extension from the list of available extensions.

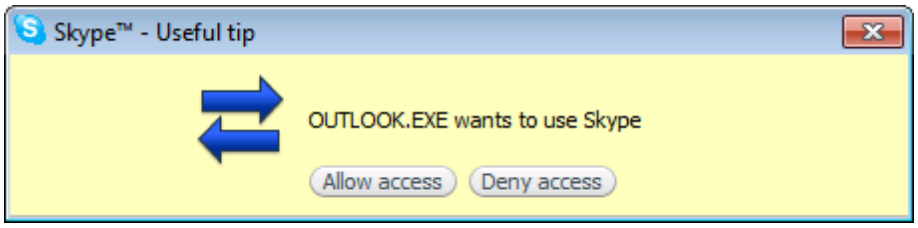


If the Avaya TAPI2 driver is not configured correctly or the IP Office is unavailable, ***InTouch*** will not function.

Note: If an extension is added to the IP Office whilst ***InTouch*** is running, it will not be available for selection until the PC is restarted.

The ***InTouch*** panel will initially be devoid of contacts, allowing the user to pick exactly the contacts that he or she is interested in for day-to-day communication.

If the user is running Skype, the user will be prompted by Skype to allow access "Outlook. exe" to access Skype.



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4 Displays

The core of ***InTouch*** is the displays that form the visible and user interaction aspects of the product. The main displays are:

1. The "***InTouch*** Panel" a fixed with (Outlook 2003) or variable width (Outlook 2007 & 2010) panel which resides on the Right hand side of any Outlook page – this display consists of various sub displays that are automatically sized as required. Sub displays are:
    i. The search panel
    ii. Contacts List comprised of (in alphabetical order):
        1. The Prime Contacts at the top of the list as nominated by the user
        2. The remaining contacts that a user has added from all available sources (Microsoft Outlook, IP Office, Skype, Yahoo! & Windows Live Messenger)
    iii. Missed Calls List
    iv. Call pop ups
2. The tool bar display (Microsoft Outlook 2003 & 2007) or ribbon display (Microsoft Outlook 2010)
3. Context menus (right-click or popup) (e.g. unopened e-mails, Outlook Contacts, ***InTouch*** call back reminder appointments or call screen pops)
4. The "Add Contacts" dialog, used to add contacts from the various contact sources to the ***InTouch*** panel.

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4.1 InTouch Panel

The central visual focus for ***InTouch*** is the ***InTouch*** Panel that resides on the Right hand side of the user's Outlook page. It is made up of a number of sub-panes and remains on the Right hand side regardless of the Outlook page the user has displayed.

The ***InTouch*** Panel can be resized (Outlook 2007 & 2010 only) to suit the individual user's available screen space, or preference. To adjust the size of the ***InTouch*** Panel, place the mouse on the left hand boarder of the panel, then click and drag the ***InTouch*** Panel to the desired size.

The ***InTouch*** Panel can also be "hidden" (Outlook 2007 & 2010 only) when the user requires additional space for Outlook or emails. To hide the ***InTouch*** Panel, click the "X" button in the top right corner of the ***InTouch*** Panel. To "Show" the ***InTouch*** Panel, press the "Show" button in ***InTouch*** ribbon (Outlook 2010) or the ***InTouch*** tool bar (Outlook 2007). Note: the "Show" button is only available whilst the ***InTouch*** Panel is hidden.

At the top of the ***InTouch Panel*** is the "Contacts" and "Missed Calls" tabs.

Under the "Contacts" tab is the "Add Contacts" button that will display the "Add Contacts" dialog, detailed further in "Add Contacts" to ***InTouch***

To the right of the "Add Contacts" button is the search panel, that allows the user to search all ***InTouch*** contacts, detailed further in Searching Contacts with ***InTouch***

Below that is a "Prime Contacts" panel that is unique to each end user. Prime Contacts are distinguished from the remaining ***InTouch*** contacts by means of a different background color (White).

The next panel down is the main directory (Blue) that includes all other entries that are not in the "Prime Contacts".

Note that if a user's "Prime Contacts" is extensive, it may extend beyond the bottom of the user's screen and the remaining ***InTouch*** contacts may not be visible without scrolling.

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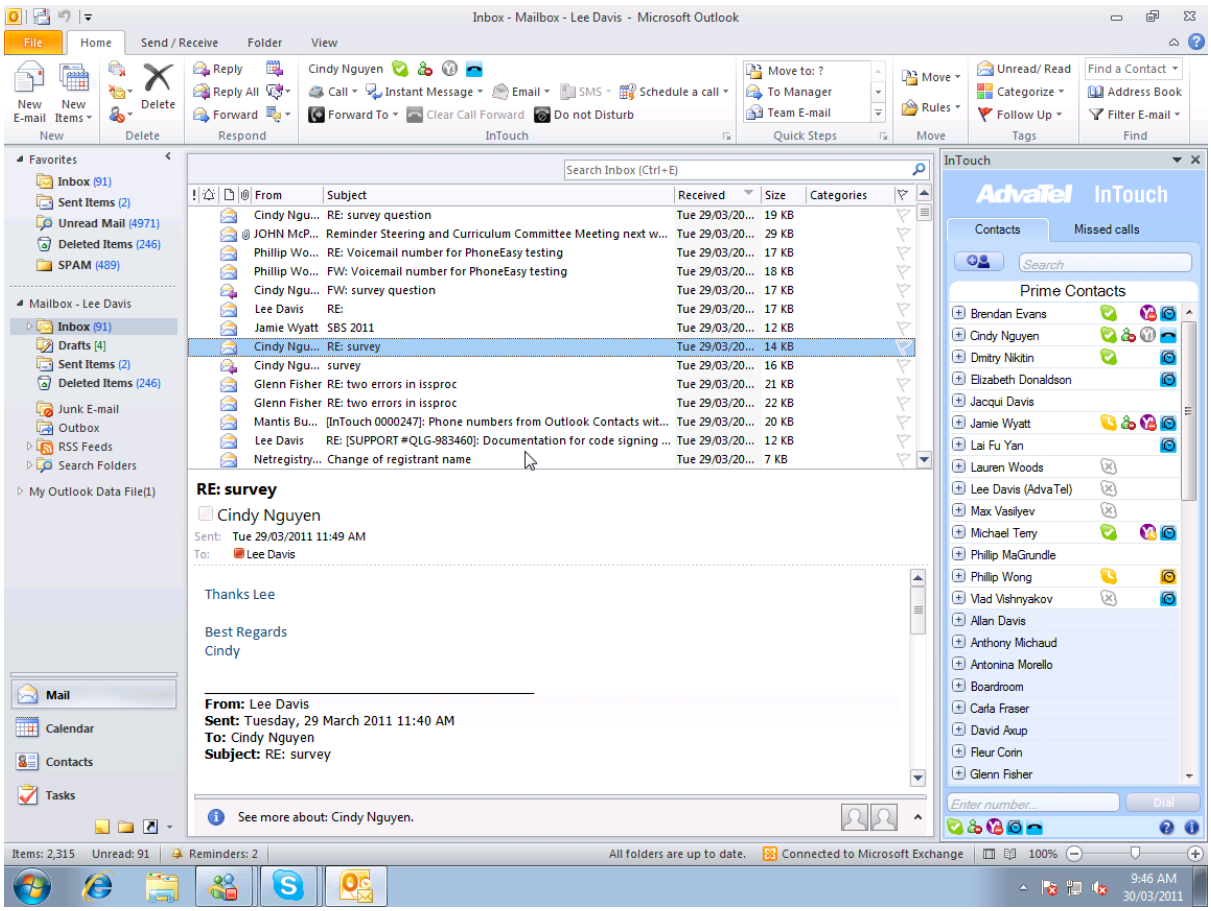

The lower panel is the Active Calls panel that only appears when calls are in progress. Further detail at Call Popup Window

The final lower panel is the Dial Box in which you can type in a number and click "Dial". ***InTouch*** will allow the user to dial arbitrary phone numbers by means of a dial box and Dial button.

The user can enter numbers, * and # characters into the dial box. Alphabetical characters will be translated into their numerical equivalents as per standard telephone keypads – detailed in the table below. No other characters are valid and will therefore not be accepted by the edit box.

Note: once installed, the ***InTouch*** panel and toolbars are always present in Outlook as described throughout this document. If a user wishes to remove ***InTouch*** from Outlook without uninstalling the product this can be achieved using Outlook's add-in management facility. Refer to Outlook's help file for more information on enabling and disabling add-in's.

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4.1.1 Hints

Hints are available to users when they hover their mouse over ***InTouch*** GUI elements. All hints are localized based on the language selected in the ***InTouch*** options.

InTouch Contact List (Prime and/or Directory contacts):

Element	Hint
Contact Name	The Contact name and a summary of any presence available for that contact. This display will NOT be truncated.
Individual presence indicators	The presence for the given indictor
Contact Entries (phone numbers, email addresses, etc…)	The Entry. This display will NOT be truncated. Note: Numbers displayed are the original raw numbers obtained from the directory, not the number that will be dialled.

Missed calls List:

Element	Hint
Contact Name, Time/Date, Missed number	The Contact name, the time/date of the missed call, the number of the missed call and a summary of any presence available for that contact. This display will NOT be truncated.
Individual presence indicators	The presence for the given indictor
Contact Entries (phone numbers, email addresses, etc…)	The Entry. This display will NOT be truncated.

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Toolbars:

Element	Hint
Contact Name	The Contact name and a summary of any presence available for that contact.
Individual presence indicators	The presence for the given indictor
Drop-down menu button ("Call…", "Instant Message…" etc…)	The same text as is displayed on the menu button label.
Drop-down items	The same text as is displayed on the item label. For example, if a contact has a business phone number listed as "555 1234" then hint (as well as the drop-down item) will read "Business (555 1234)"

Ribbon Tabs (Outlook 2007 & 2010 only):

Element	Hint
Contact Name	The Contact name and a summary of any presence available for that contact.
Individual presence indicators	The presence for the given indictor
Drop-down menu button ("Call…", "Instant Message…" etc…)	The same text as is displayed on the menu button label.
Drop-down items	The same text as is displayed on the item label. For example, if a contact has a business phone number listed as "555 1234" then hint (as well as the drop-down item) will read "Business (555 1234)"

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Call Popup:

Element	Hint
Call Popup buttons	The action that the button will perform.
Answer	"Answer the call"
MSN	"Start an MSN IM Chat"
Skype	"Start an Skype IM Chat"
Yahoo	"Start an Yahoo IM Chat"
Email	"Send an Email"
SMS	"Send an SMS"
Hold	"Place call on Hold"
Call back	"Schedule a call back reminder"
Hang up	"Hang up this call"
All remaining Call Popup areas	The Contact name and a summary of any presence available for that contact.

InTouch Dial box:

Element	Hint
Dial Box	"Enter a number you wish to dial here, and click the adjacent Dial button"
Dial Button	"Dial the number in the adjacent text entry box"

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InTouch status bar:

Element	Hint
"My Presence" indicators	The status of the user if the service in online or the reason the service is offline, if the service is offline. e.g. if ***InTouch*** were successfully connected to Skype, the hint would be the Skype presence of the current user. If the service was not online, the hint will display "Not Available"
Help Button	"***InTouch*** Help"
About Button	"About ***InTouch***"

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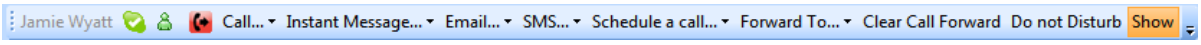
4.2 InTouch Tool Bar / Ribbon Display

InTouch incorporates a number of Outlook toolbars. Toolbars are visible on the main Mail, Calendar & Contact folder views and:

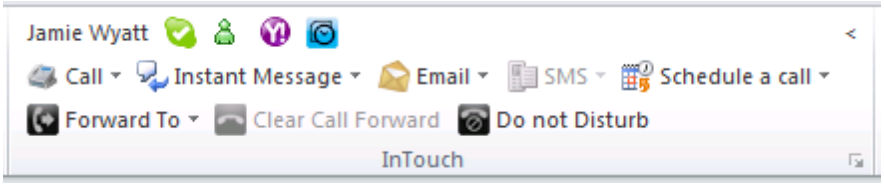
- For Office Outlook 2003 – individual mail contact and calendar items
- For Office Outlook 2007 & 2010
  - mail reading view (not composing new mail view)
  - contact view
  - appointment view (not meeting view)

Outlook 2003 & 2007:



Note: The <Show> button will only display when the ***InTouch*** panel is hidden. (Outlook 2007 only)

Outlook 2010:



The Toolbars will display as much information and activities as are available for the contact associated with the currently selected item.

For email items this contact is the sender of the email. ***InTouch*** attempts to find a matching ***InTouch*** contact based on a unique identifier assigned by Outlook or, failing that, the first ***InTouch*** contact with a matching email address.

For Outlook contacts it is the contact itself and any details of other contacts that might have been amalgamated with that Outlook contact.

For appointment items that were created by scheduling a callback using ***InTouch***, it is the contact that the callback was scheduled against.

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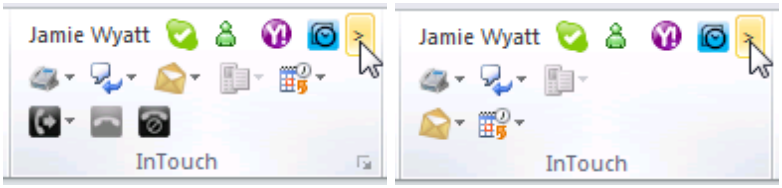
Compact Ribbon (Outlook 2010 only)



Compact Ribbon for Explorers **Compact Ribbon for Inspectors**

The ***InTouch*** Ribbon can be changed from Full to Compact mode (and vice versa) by use of the "<" (contract) or ">" (expand) button within the ***InTouch*** Ribbon.
Compact mode removes the button labels within the ***InTouch*** ribbon, leaving only the icons for each option. Grayed out icons indicate that option is unavailable for the selected contact.

The menus on the toolbar or ribbon will show the following actions:

- **Call**: All calls that are available via the IP Office, Calls that can be made using Skype and voice-chat sessions that can be started using Skype, Yahoo! and/or MSN
- **Instant Messaging**: start a chat session using Skype, Yahoo! or MSN as available
- **Email**: start a blank email to selected email address
- **SMS**: send a short text message (maximum 160 chars) to any number (network dependant)
- **Schedule a call**: schedule a call to an available number
- **Forward To**: Forwarding your extension to another pre-configured (see ***InTouch*** Options) or ad-hoc number (indicated on the Handset if successfully activated)
- **Clear Call Forward**: Clearing the Call Forwarding that has been set to your extension (indicated on the Handset if successfully activated)
- **Do not Disturb**: Setting do not disturb to your extension will forward you calls to to Voicemail or another pre-configured extension (refer to you IP Office system administrator) indicated on the Handset and Telephony presence status at the bottom of ***InTouch*** if successfully activated)

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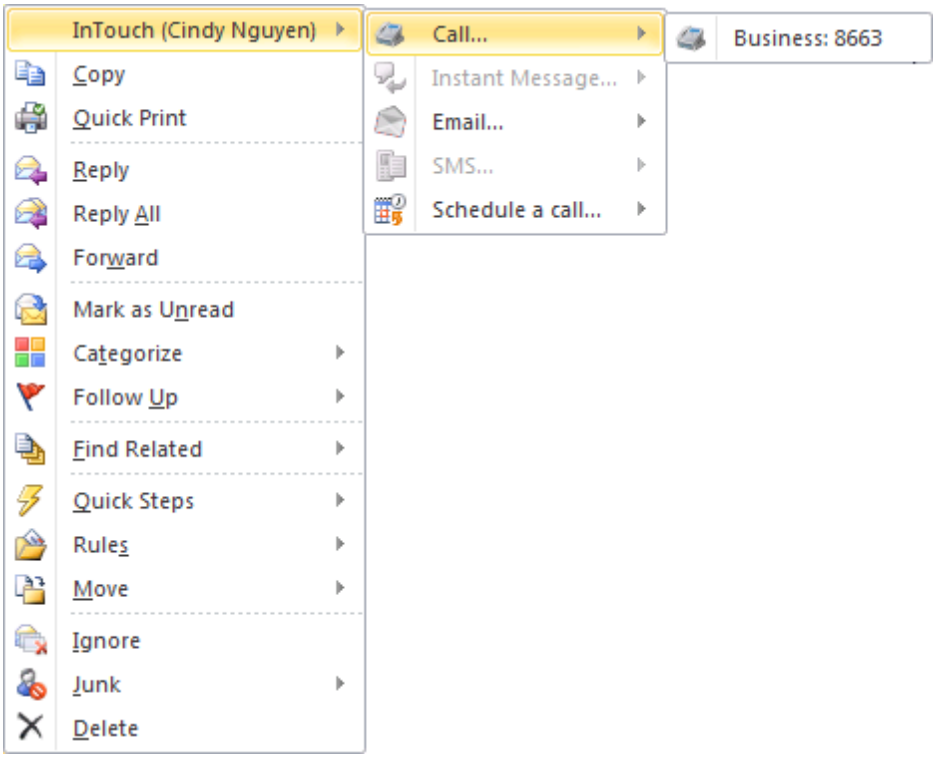
4.3 Context ("right-click" or "popup") menus

In various parts of the ***InTouch*** operation the user can right click to display ***InTouch*** information and activities.

Note: Context menus will not display IP Office, Outlook Calendar, Skype, Yahoo! or MSN Presence.

Email, Outlook Contact and Appointment Context Menus with *InTouch* sub-menu inserted.



The Email, Outlook contact and Appointment context menu will display an ***InTouch*** sub-menu containing all the actions available for the contact based on the item that has been right-clicked upon.

If there no actions available or no contact was able to be found, the ***InTouch*** item will be disabled.

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The actions available fall into the following categories – if no actions are available for a given category, there will be no sub-menu for that category.

Call:

All calls that are available via the IP Office, Calls that can be made using Skype and voice-chat sessions that can be started using Skype, Yahoo! and/or MSN.

Instant Messaging:

start a chat session using Skype, Yahoo! or MSN as available.

Email:

start a blank email to selected email address.

SMS:

send a short message (maximum 160 chars) to an available number.

Schedule a call:

schedule a call to an available number.

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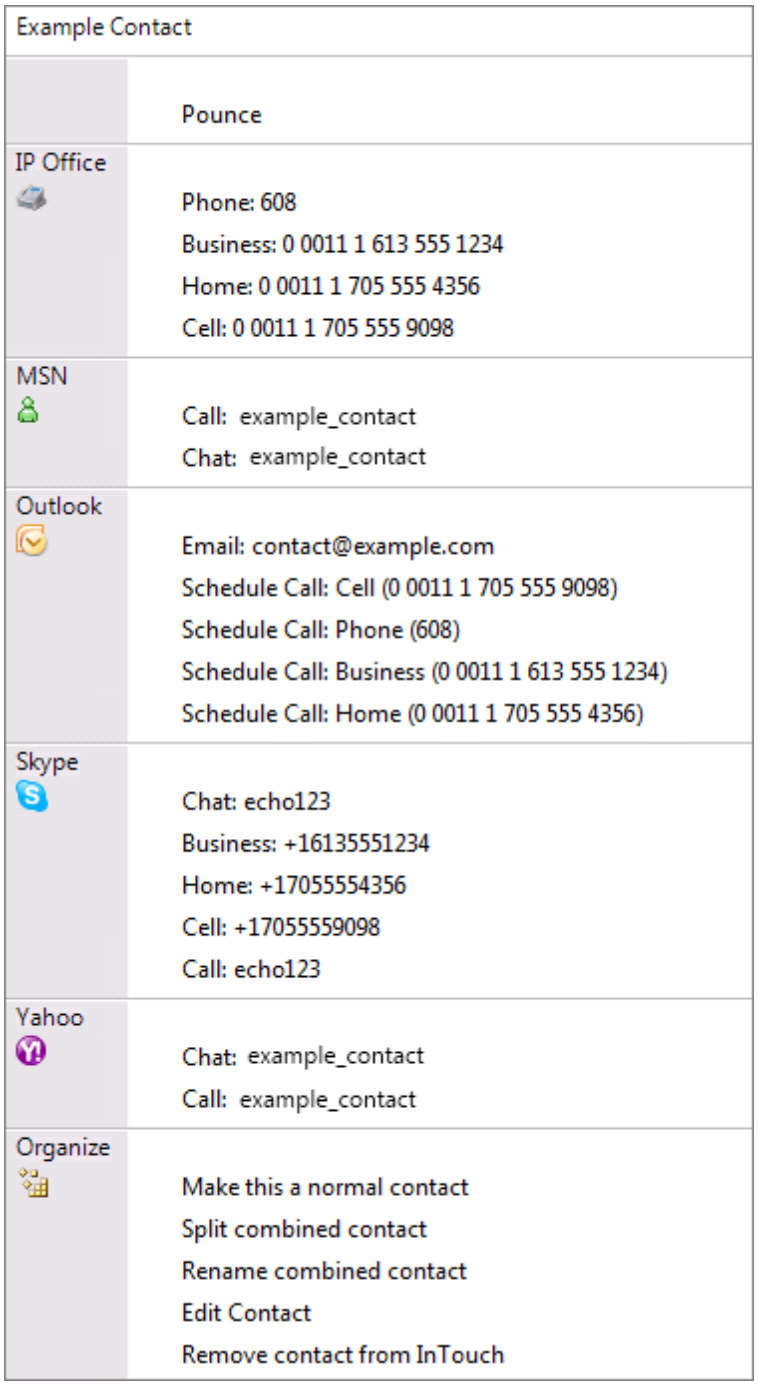
Contacts Context Menu



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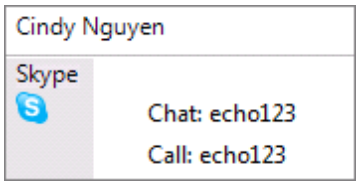
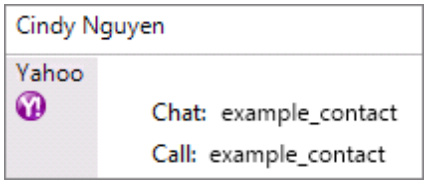
Contact Entry context menu

Each contact entry (a phone number, email address, Skype or MSN identity) can be right-clicked upon. This will display a context menu with the only the actions applicable for that entry.

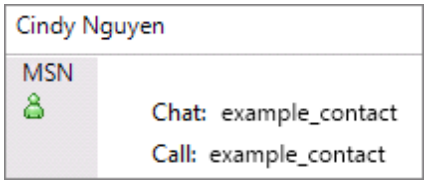
Skype Entry:



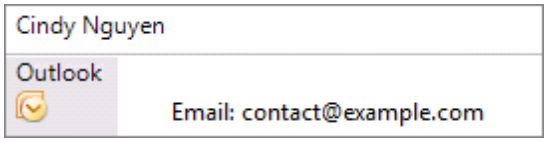
Yahoo! Entry:



MSN Entry:



Email Entry:



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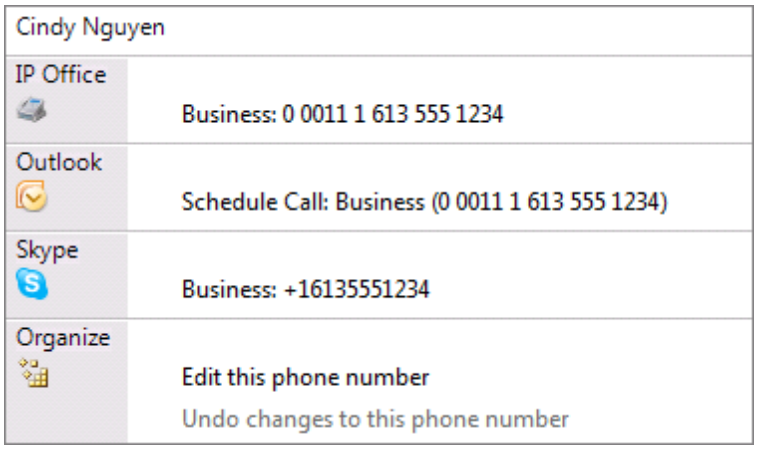
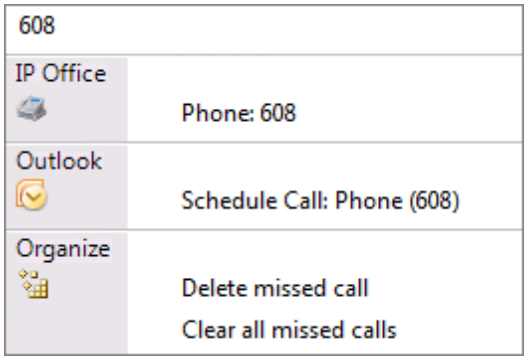
Phone Number Entry:



Missed Call Context Menu



Missed call context menus behave identically to the regular ***InTouch*** Contacts context menus (previous page) with the exception that there is a "Delete missed call" item at the bottom. This action will permanently remove that call from the missed calls list.

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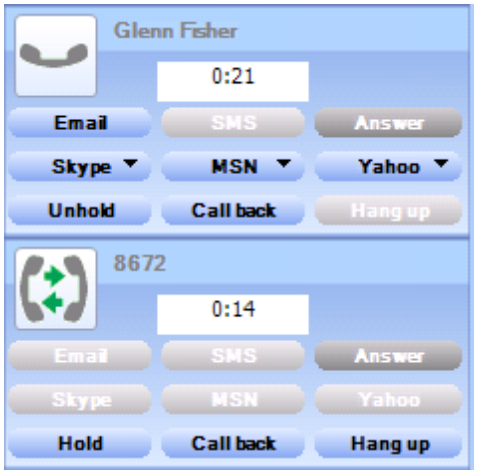
4.4 Call Popup Window

Incoming and Outgoing calls made using ***InTouch*** or on the user's handset are represented at the bottom of the ***InTouch*** Panel by a small call popup. ***InTouch*** has no internal limit to the number of call windows it can display however if more than 2 calls appear at the user's Set ***InTouch*** will display a scroll bar alongside the call windows such that not more than 2 will be displayed on screen at once.

Note: If a Pounce notification is in place then a maximum of 1 call will be displayed

The buttons on the call popup have the following functions:



Email - Launch a new email message to a selected email address associated with the

SMS - Send a short text message to the caller (network dependant)

Answer - Answers the incoming call

Skype - Instant Message or "Chat" to the callers associated Skype contact

MSN - Instant Message or "Chat" to the callers associated Windows Live Messenger contact

Yahoo - Instant Message or "Chat" to the callers associated Yahoo! contact

Hold - Places the caller on hold. The button will change to **Unhold** whilst the call is being held

Call back - Schedules a call back to the callers number

Hang up - Terminates the call

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If a button has more than one (1) selection available, a drop down box will be show to all the user to specifically select the desired contact method.

If a button is "grayed out", then that option is not available, or not associated with the call.

Moveable Call Popup Window

When Outlook is not in focus (e.g. you are viewing a webpage or document), the call popup window will float on top of the current active window. The call pop window can then be moved anywhere onscreen by: <click> and hold on the mouse, within the call information area (top) of the call popup window, then dragging the call popup window to the desired location.

If the ***InTouch*** Panel size is reduced to not allow the full display of the call popup window, the call popup window will float into the bottom right corner of the screen. The popup can then be dragged to any desired location.

The Call popup window will return to the ***InTouch*** panel, if the ***InTouch*** panel size is adjusted to a size that will accommodate the popup.

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4.5 "Add Contacts" to InTouch

The "Add Contacts" dialog, accessed by clicking the "Add Contacts" button on the main ***InTouch*** window, is use to add contacts to the main ***InTouch*** panel.

The "Add Contacts" dialog will present the user with a screen containing 4 major elements:

1. A drop down list of Contact Directories:
    a. Local directory (IP Office)- The default selection
    b. External Directory (IP Office)
    c. Each contact folder that has been made available for use as an Outlook Address Book

    By default there is only 1 folder but the user may add more. There will be an entry for each folder. The entry will be listed as "Contact Folder Name (Message Store Name)" e.g. "Contacts (Mailbox – John Smith)"

    d. The Global Address List
    e. Skype Contacts (if available)
    f. Yahoo! Contacts (if available)
    g. MSN Contacts (if available)
2. A search box that operates only on the currently selected Contact Directory
3. A grid display of the contacts from the Contact Directory.

    This grid will be similar in form to the Outlook Address Book, listing the contacts' details in rows of data.

    These contacts will include a check-box at the very left-hand-side that indicates if that individual contact is included in the "Contacts" list (checked = included)

    The user will NOT be able to dial, email, IM, schedule a call back or perform other ***InTouch*** activities from these lists – only mark these contacts for use in the "Contacts" list.
4. New Contact. To add new Outlook Contact

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Contact Directories

Contact Directories can be thought of as the individual folders where the contacts are sourced from. Skype, Yahoo!, IP Office and MSN only have 1 Contact Directory each but Outlook can have many - 1 for each folder nominated as available for use in the Outlook Address Book and 1 for the Global Address List.

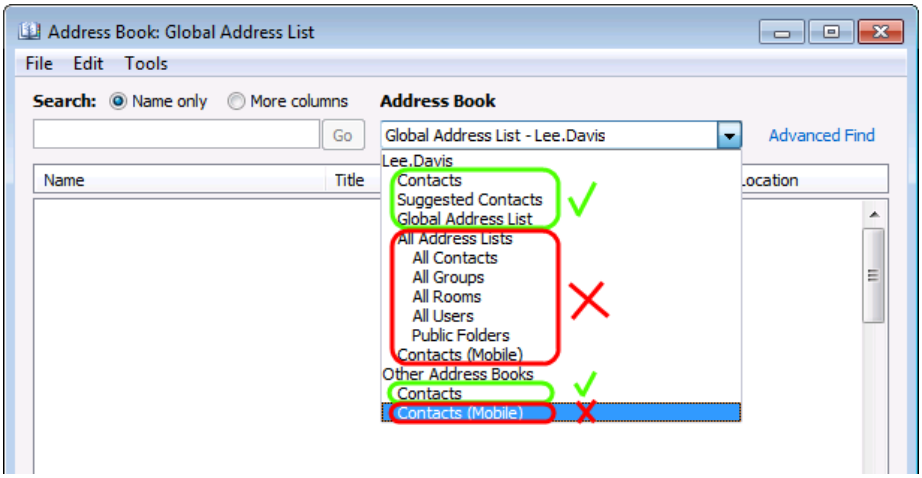
Skype, Yahoo!, MSN & TAPI Contact Directories

Skype, Yahoo!, MSN and TAPI will each have a single Contact Directory.

Outlook Contact Directories

InTouch will use the list of Address Book Providers provided by Outlook as the basis of the ***InTouch*** Contacts from Outlook.

By Default this list includes only the Global Address List and the user's Contact folder from their default store (generally, their Mailbox on the Exchange Server)



The image above displays Contact folders sourced from other Personal Folders in addition to the default "Contacts" from the Mailbox to illustrate that Outlook can support more than 2 Contact Directories.

The list also contains "All Contacts', "All Groups", "All Users" but these will not be included as they just reproduce sub-sets of the contacts from the Global Address List.

The "Outlook Address Book" item is a container for the Contact folders and does not contain contacts itself and will therefore not be listed.

The "Public Folders" item has not been observed to include any contacts and will therefore not be included. Contact folders stored within the Public Folders store can be included by the same means as adding a Contact Folder from the user's message store(s) as outlined in Appendix A

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Configuration

Initially the ***InTouch*** list will be completely empty.

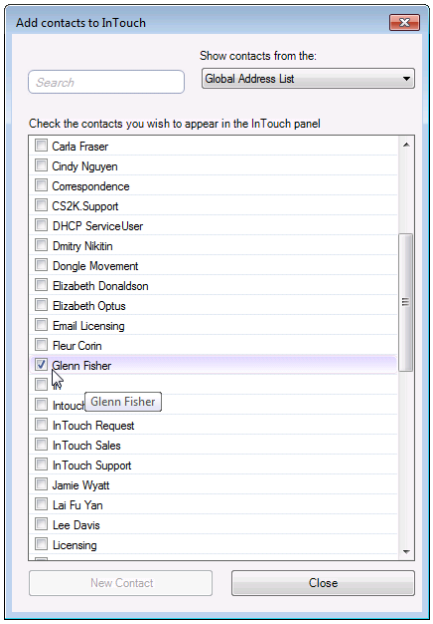
InTouch will not *automatically* include any contacts from any Contact Directory.

InTouch users will add contact manually by way of the "Add Contacts" dialog reached by clicking the "Add Contacts" button on the main ***InTouch*** panel.

InTouch users will add or remove individual contacts from the various Contact Directories by checking or clearing (respectively) the tick box to the left of the desired contact within the "Add Contacts" dialog.

Outlook users can add other folders to the Outlook Address Book. Instructions to do so are listed in Appendix A. This is an existing Outlook feature.

The IP Office directory will be the default selected directory whenever the "Add Contacts" dialog is displayed.



Select the contact you wish to add into ***InTouch***.

InTouch will analyze the selected contact and engage the "Amalgamation Candidates" wizard upon detecting the following conditions:

1. The first or last names of the added contact "match" any of the existing ***InTouch*** contacts (including contact entries)
2. Any contact entry (phone number, email address etc) match any of the existing ***InTouch*** contacts (including contact entries)

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The wizard will display all contacts which "match" the newly added contact in a list. (Amalgamation Candidates)

Select the contact that "matches" the newly added contact then press "Combine".

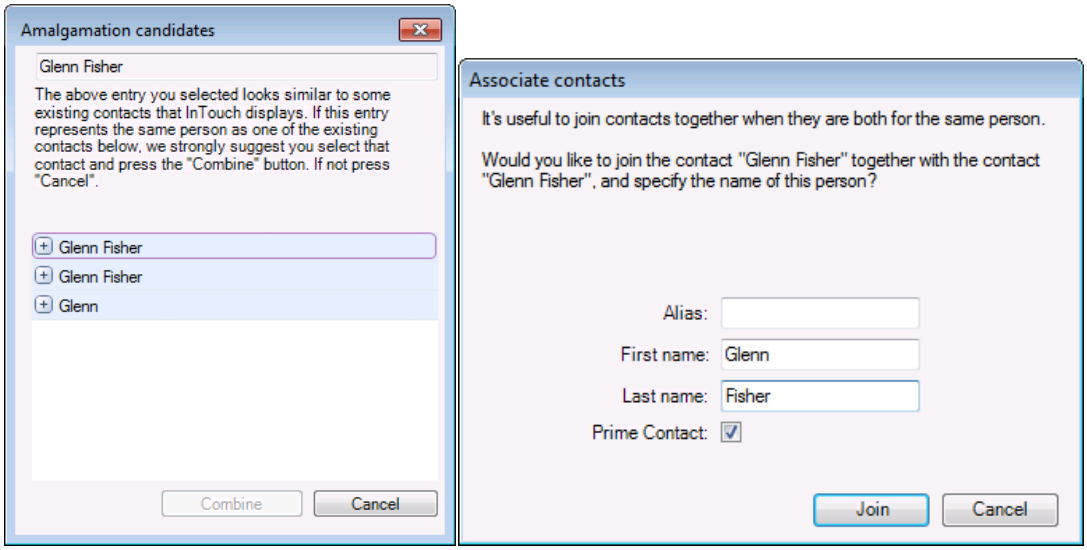
You are then asked to to confirm the contact amalgamation (Associate Contacts)

Enter the contacts "First Name", "Last Name" and Alias (optional), and select if the contact is to be a "Prime Contact".

Press "Join" to confirm the contact amalgamation.

Or, select "Cancel" to close the wizard if none of the recommended existing contacts "match" the newly added contact.

If ***InTouch*** does not detect a "match", then ***InTouch*** will not engage the wizard at all.


Amalgamation candidates
Glenn Fisher
The above entry you selected looks similar to some existing contacts that InTouch displays. If this entry represents the same person as one of the existing contacts below, we strongly suggest you select that contact and press the "Combine" button. If not press "Cancel".
Glenn Fisher
Glenn Fisher
Glenn
Combine
Cancel
Associate contacts
It's useful to join contacts together when they are both for the same person.
Would you like to join the contact "Glenn Fisher" together with the contact "Glenn Fisher", and specify the name of this person?
Alias:
First name: Glenn
Last name: Fisher
Prime Contact:
Join
Cancel

Adding New contacts from *InTouch* (for Outlook Contacts only)

Contacts can be added directly from ***InTouch*** (Outlook Contacts only). The user can select an Outlook contact folder (excluding the Global Address List) within the "Add Contacts" dialog and create a new contact in Outlook, that will automatically be included into the ***InTouch*** contact list.

Note: If you decide to add a Outlook Contact using ***InTouch*** that already exists within an Outlook contacts folder (excluding the Global Address List), and you fill in the details and click "save & close". Outlook will display a prompt to stating that the contact already exists, and do you want to update the contact. If you click "yes", the contact will be updated within Outlook BUT will *not* be added into ***InTouch***. You will need to add the updated contact manually through the "Add Contacts" dialog

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5 InTouch Contacts

InTouch users can incorporate into one list, contacts from:

- Outlook Contacts from the user's Mailbox and/or currently open personal and archive folders.
- Active Directory via Outlook Global Address Book provided by the Exchange Server.
- Other Outlook directories such as Public Folders
- Skype contacts
- Yahoo! contacts
- MSN contacts

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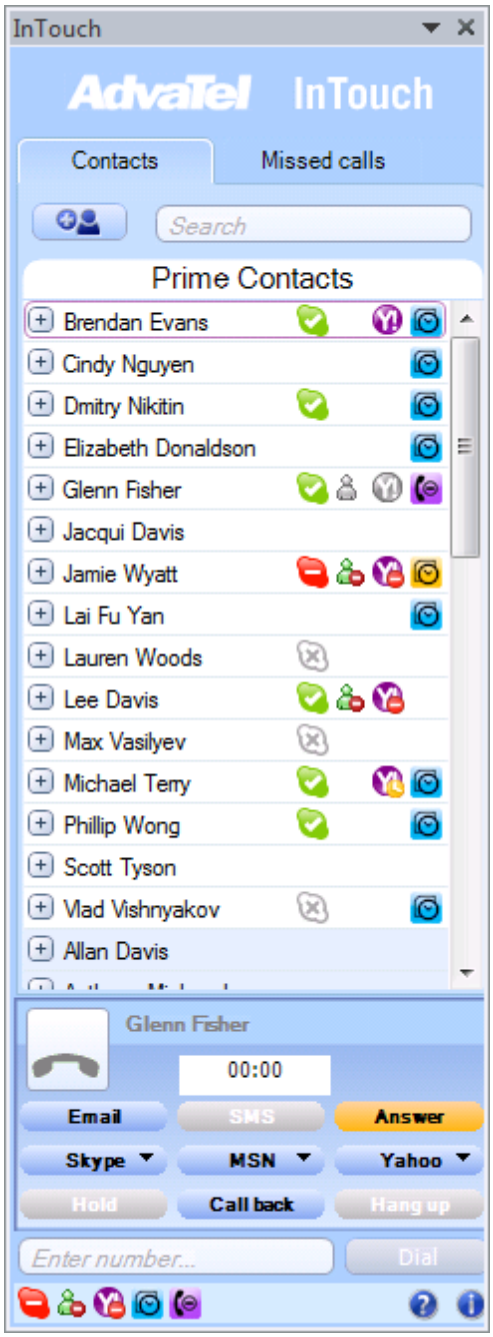
5.1 Incorporation of Contacts



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Incorporation of Contacts

Contacts are added to this list via the "Add Contacts" dialog.

While the contacts are being loaded ***InTouch*** will continually update the ***InTouch*** contact list.

These contacts are then sorted in alphabetical order and the user manually eliminates duplicates via drag-and-drop.

Updates to contacts from other platform such as Skype, Yahoo!, MSN or Outlook that are listed in ***InTouch*** will automatically be reflected in ***InTouch*** as soon as the information is available. e.g. Changes to Skype contacts are almost instantaneous while Outlook Global Address List contacts will require a restart of ***InTouch*** before the changes are picked up.

As the next step, the user can construct their personal "Prime Contacts" which is a subset of the names in a separate listing above the start of the main list. These are listed first and available to the ***InTouch*** user without the need to perform a search. The "Prime Contacts" can be viewed from any Outlook page.

Moving ***InTouch*** contacts between the main directory and the "Prime contacts" is achieved by right-clicking on the desired contact and selecting "Make this a prime contact" or "Make this a normal contact"

Prime contacts are distinguished from the remaining ***InTouch*** contacts by way of their background color.

Other than "Prime" and normal contacts, no contact grouping is available within ***InTouch***.

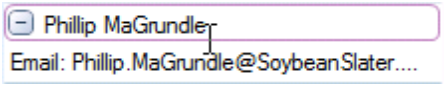
Contacts Displays:

There are two forms of contact display, collapsed and expanded.

By default all contacts are displayed in the collapsed form, showing only the contact's name and any presence indicators they might have.

The expanded form can be displayed by clicking on the small "+" button to the left of the contact name if the contact has ***InTouch*** displayable details (e.g. telephone number(s), email address(es), IM address(es))

If any one of the contact's details are two long to fit on the display, it will be truncated and an ellipses mark "…"placed on the end (as seen below.)



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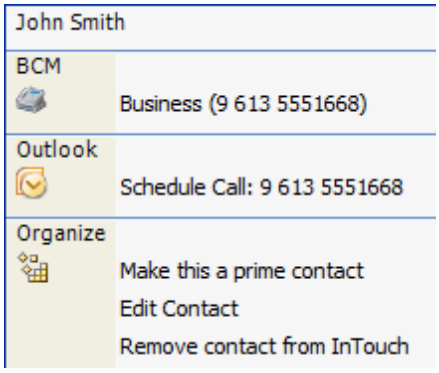
Note: Modifications to Outlook, Skype, Yahoo! and MSN contacts that have been included in the ***InTouch*** panel will automatically be reflected in ***InTouch*** when available. E.g. the Outlook Global Address List does not support add/modify/delete notifications however a users' "Contacts" folder does.

Editing a contact from the ***InTouch*** panel:

Any contact that has been sourced from an Outlook contact folder that the user has Write access to can be edited using the ***InTouch*** right-click menu.



Selecting the Edit item will display the Outlook contact dialog. When the User saves the changes, ***InTouch*** will automatically apply the changes to the contact within the ***InTouch*** panel (as well as to the Contact in Outlook).

Removing contacts directly from the ***InTouch*** panel:

InTouch contacts can be removed directly from the right click menu.

Clicking the "Remove" item will exclude from ***InTouch*** the individual contact or, for a merged contact, all the contacts that go to make up a merged contact. The source contacts will not be deleted from their original locations.

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5.2 Searching Contacts with InTouch

InTouch supports searching across any of the available IP Office, Outlook, Skype, Yahoo! and MSN fields. To search for contacts, enter the text you wish to search for and after a short (approximately 1 second) pause, the search will begin returning matching ***InTouch*** contacts. The fields searched are:

- Outlook
  - First Name
  - Last Name
  - Company (Not displayed in contact details)
  - Job Title (Not displayed in contact details)
  - Email Address 1,2 & 3
  - Phone Numbers
    - Cell Phone
    - Business & Business 2
    - Home & Home 2
    - Assistant
    - Company
    - Car
    - Primary
- IP Office
  - Extension
  - Display Name
- Skype
  - Skype Name
  - Office Phone
  - Mobile Phone
- Yahoo!
  - Sign In Name
  - Name
- MSN
  - Sign In Name (Email address)
  - Name

Note: if a contact that is part of an amalgamated contact matches the search, the entire amalgamated contact will be returned, not just the matching sub-contact.

To cancel or clear a search you can either delete the text, press the cancel button (x) or press ESC while the cursor is in the Search Box.

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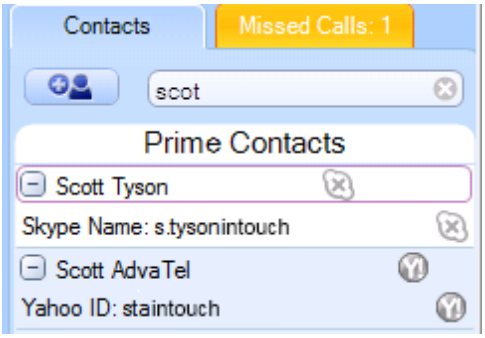
5.3 Amalgamation of duplicated contacts

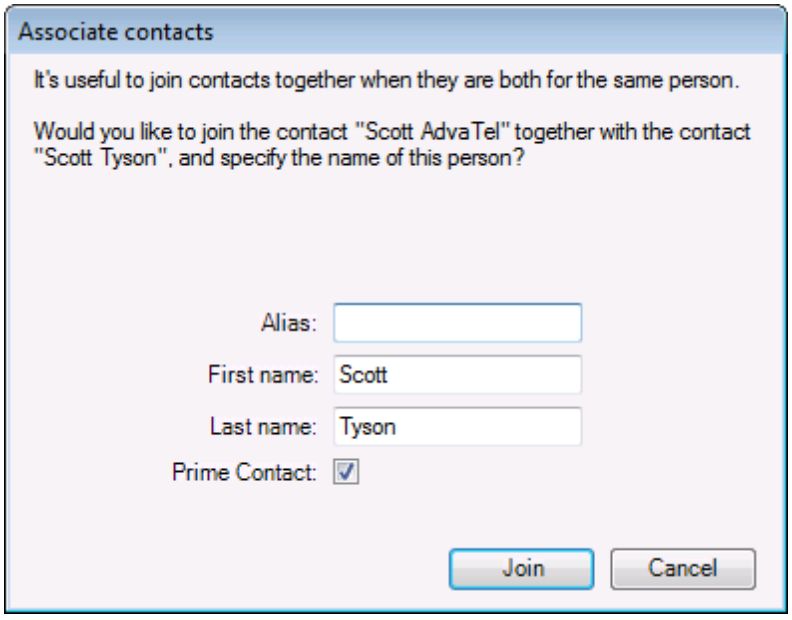
When many contacts are listed from a number of sources it is likely that there will be duplicated entries. E.g. Nick may be in their Outlook Active Directory as well as a users Skype list. This duplication can be amalgamated into a single entry by using drag-and-drop of one entry onto the other as outlined below.

E.g.

Step 1: Search for the duplicated entry via the Search box and drag one entry to the other.



Step 2: On the "Associate Contacts" pop up click join.


Associate contacts
It's useful to join contacts together when they are both for the same person.
Would you like to join the contact "Scott AdvaTel" together with the contact "Scott Tyson", and specify the name of this person?
Alias:
First name: Scott
Last name: Tyson
Prime Contact:
Join
Cancel

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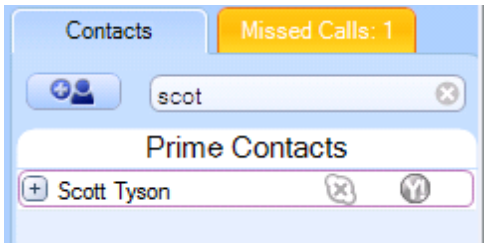
Step 3: The result is a merger of Skype entry "Scott Tyson" & Yahoo! Entry "Scott AdvaTel"



By default merged contacts are marked as Prime, clear the "Prime Contact" checkbox to combine the contacts without making the merged contact Prime.

Combined contacts can be renamed or by right-clicking on the contact and selecting "Rename combined contact". NOTE: this will only change the name of the combined contact – ***InTouch*** will not rename the individual/original contacts

Combined contacts can be split apart by right-clicking on the contact and selecting "Split combined contact" this will separate all of the individual contacts. Individual contacts that were marked Prime before they were combined will remain as prime. Likewise individual contacts that were not Prime will remain, non-Prime.

At any time, Status / BLF (Busy Lamp Field) / Presence indicators (if available) relating to the names displayed on the screen will be visible to the ***InTouch*** user.

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6 Presence

Presence is divided into:

- BLF (Busy Lamp Field) information via the IP Office TAPI
- Outlook Calendar mining
- Skype related presence in ***InTouch***
- Yahoo! related presence in ***InTouch***
- MSN related presence in ***InTouch***
- ***InTouch*** "sending" IP Office BLF (Busy Lamp Field) presence to Skype
- ***InTouch*** "sending" IP Office BLF (Busy Lamp Field) presence to Yahoo!
- ***InTouch*** "sending" IP Office BLF (Busy Lamp Field) presence to MSN

Note: the IP Office BLF information is limited to call status and diversion details only. Call details (caller id, caller name etc) will not be displayed to maintain privacy.

Likewise Outlook calendar availability is limited to busy status (Busy or Out of Office) and duration.

These presence indicators are automatically updated based on the relevant source. They are not directly configurable by the user but reflect the information provided by the contact i.e. phone calls, appointments, Skype, Yahoo! & MSN Status.

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6.1 BLF (Busy Lamp Field) information via the IP Office interface

There are 4 telephony states displayed:

- Idle
- Busy (Ringing, On a call and Call Waiting)
- Do Not Disturb
- Call Forward
- Information Unavailable

Note:The Information Unavailable state may be encountered at start-up as the IP Office are being queried for their initial status or on soft phone lines where the soft phone is not running/connected to the IP Office.

There are three Microsoft Outlook states displayed:

- Free
- In a meeting – Hover cursor to display meeting duration – this features has special importance so users can make the best decision based on the extra level of information provided.
- Away (Out Of Office) – Hover cursor to show return time / date – this reveals the time and date of the planned return. Very useful for associates of people on leave or business trips.

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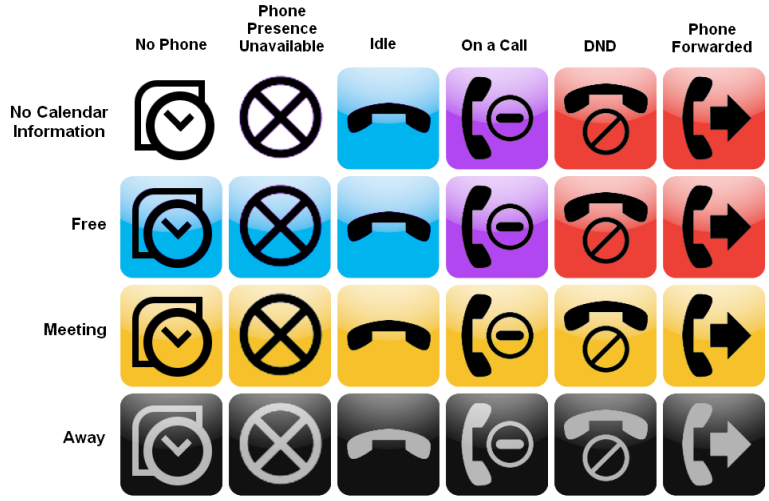
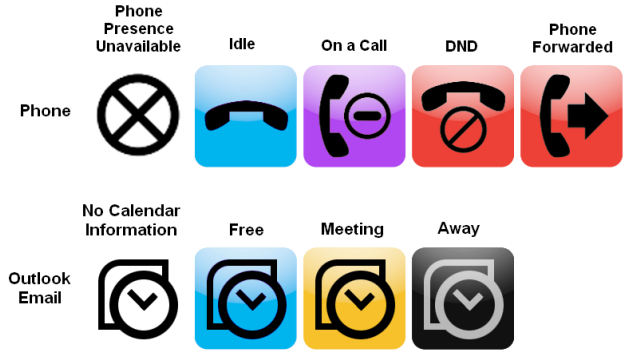
The Outlook and IP Office Presence states are then combined into one indicator as follows:

Combined Icons



Contact Entry Icons



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6.2 Outlook Calendar mining

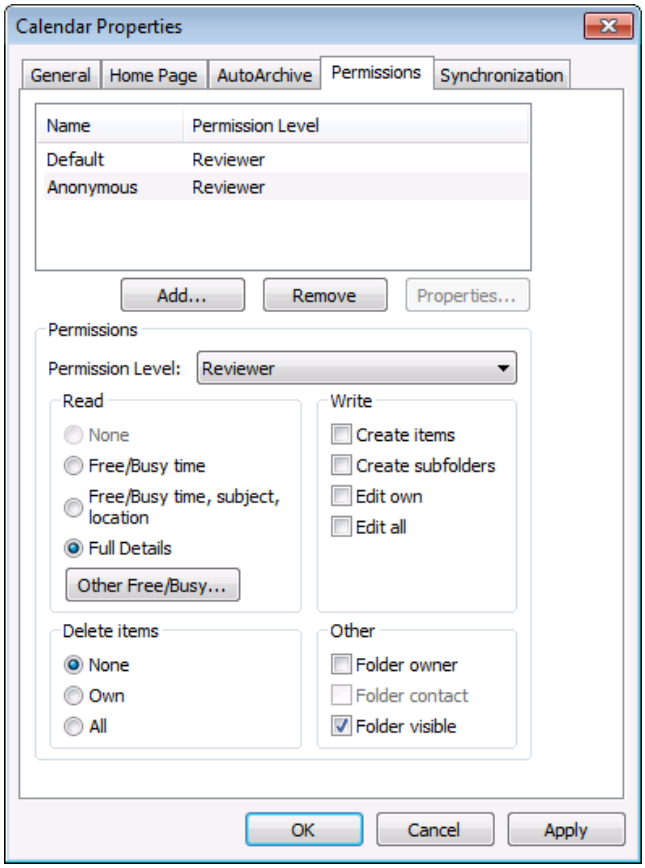
InTouch will mine the calendars of those Prime Contacts who are sourced from the Microsoft Exchange Global Address List. This information will be updated every 5 minutes.

InTouch will not mine the calendars of contacts who are not nominated as Prime Contacts.

This feature requires that the calendar of the contact to be mined, has allowed "Reviewer" access to their calendar.

In Outlook, from the user to be monitored:

- Select "Tools" then "Options"
- From the "Preferences" tab, select "Calendar Options"
- Select "Free/Busy Options"
- Select the "Permissions" tab
- Set the "Default" and "Anonymous" permission level as "Reviewer"



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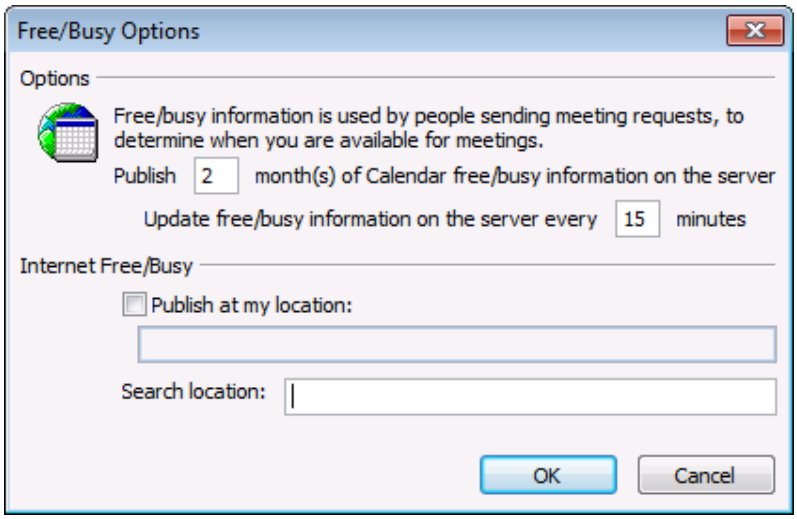
NOTE: By default, Outlook will only publish 2 months of Calendar free/busy information. In order for ***InTouch*** to correctly display the date of an appointment expiration beyond this time, the published months will need to be extended.

In Outlook:

- Select "Tools" then "Options"
- From the "Preferences" tab, select "Calendar Options"
- Select "Free/Busy Options"
- Select the "Permissions" tab
- Select "Other Free/Busy..."
- Change the "Publish (x) month" to the required value


Free/Busy Options
Options
Free/busy information is used by people sending meeting requests, to determine when you are available for meetings.
Publish 2 month(s) of Calendar free/busy information on the server
Update free/busy information on the server every 15 minutes
Internet Free/Busy
Publish at my location:
Search location:
OK
Cancel

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6.3 Skype related presence in InTouch

Should a Skype account (who is represented in the current ***InTouch*** screen) change their presence status then the relevant Skype icon will be displayed in ***InTouch***.

Note that ***InTouch*** uses the Skype Icons as per version 4 of Skype.

6.3.1 InTouch "sending" IP Office BLF (Busy Lamp Field) presence to Skype

When the phone is in use (On Call/Ringing/Call Waiting) or the Outlook calendar is set to away/in a meeting/out of office, ***InTouch*** will set the user's Skype status to "Do Not Disturb".

Note: If the Skype User sets their status to Offline/Invisible then ***InTouch*** will not update their Status in order to respect their privacy

Note: Because ***InTouch*** is accessing the user's own calendar and pushing the information to the user's own Skype contact, Exchange based calendar permissions are of no influence.

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6.4 Yahoo! related presence in InTouch

Should a Yahoo! account (who is represented in the current ***InTouch*** screen) change their presence status then the relevant Yahoo! icon will be displayed in ***InTouch***.

6.4.1 InTouch "sending" IP Office BLF (Busy Lamp Field) presence to Yahoo!

When the phone is in use (On Call/Ringing/Call Waiting) or the Outlook calendar is set to away/in a meeting/out of office, ***InTouch*** will set the user's Yahoo! messenger status to "Busy".

Note: If the Yahoo! User sets their status to Offline/Invisible then ***InTouch*** will not update their Status in order to respect their privacy

Note: Because ***InTouch*** is accessing the users own calendar and pushing the information to the users own Yahoo! contact, Exchange based calendar permissions are of no influence.

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6.5 MSN related presence in InTouch

Should a MSN account (who is represented in the current ***InTouch*** screen) change their presence status then the relevant MSN icon will be displayed in ***InTouch***.

6.5.1 InTouch "sending" IP Office BLF (Busy Lamp Field) presence to MSN

When the phone is in use (On Call/Ringing/Call Waiting) or the Outlook calendar is set to away/in a meeting/out of office, ***InTouch*** will set the user's MSN messenger status to "Busy".

Note: If the MSN User sets their status to Offline then ***InTouch*** will not update their Status in order to respect their privacy

Note: Because ***InTouch*** is accessing the users own calendar and pushing the information to the users own Skype contact, Exchange based calendar permissions are of no influence.

When Skype or MSN are closed then ***InTouch*** will continue to display the last observed contact details but will no longer show a presence indicator for each Skype & MSN contacts as appropriate. When Skype or MSN come back on line ***InTouch*** will up-date the relevant presence.

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7 Other Features

7.1 Email

InTouch does not in any way change the traditional use of Outlook email. However, it does add considerable new capability.

An ***InTouch*** user can highlight an email, right click on it and choose from a list of options which will appear. The choices are (providing the information is available):

- Call - Phone the contact from a list of associated numbers
- Instant Message - Start an Instant Message chat with the contact using Skype, Yahoo! or MSN
- Email - Send an email to an address associated to the contact
- Schedule a call – this will place a reminder in Outlook Calendar and a screen pop will appear at the call-back time. The call-back could be 5,10,15,30 minutes, 1 hour or "select" allowing manual entry of the time/date
- SMS (optional) - Send a text message to a number associated to the contact

Alternatively - these other forms of communication can also be achieved by highlighting the e-mail and then selecting the required button on the tool bar.

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7.2 Calendar items/Appointments

InTouch automatically interacts with Outlook Calendar in a number of ways:

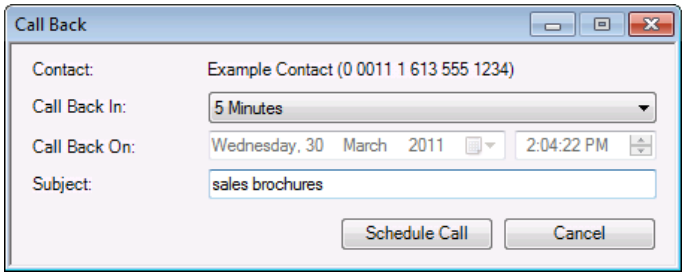
- ***InTouch*** will mine the Outlook Calendar of ***InTouch*** Prime contacts who are, or include an Outlook Contact, at 5 minute intervals.
- ***InTouch*** can be used to arrange for a scheduled reminder call which will be placed in the user's calendar. These call back reminders are activated from a call screen pop. By clicking on the "call back" button a user will set a call back reminder in their Outlook calendar. Call back reminders can also be scheduled at any time from any ***InTouch*** context menu or ***InTouch*** Toolbar for any contact that has one or more phone numbers.

The dialog for scheduling a call back reminder.

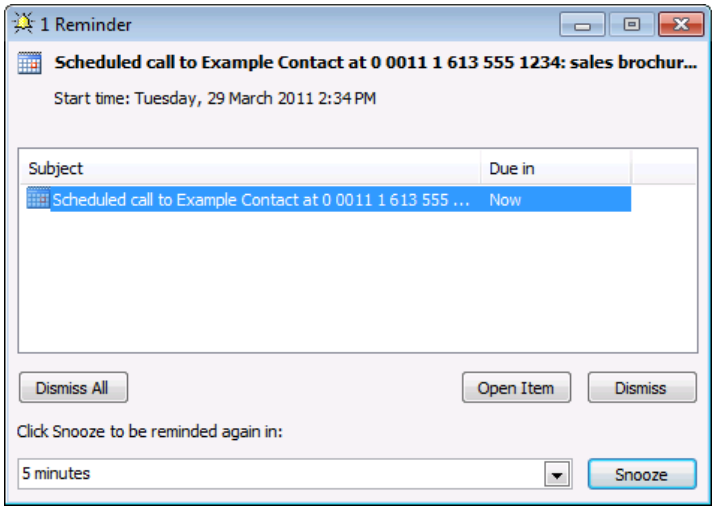
The dialog shows the Contact name and number for callback.

The time to call back as either an offset from now or a specific date and time

An optional subject – a reminder as to what you are calling this person about.



This reminder will then be included in the Outlook Reminders popup window:


1 Reminder
Scheduled call to Example Contact at 0 0011 1 613 555 1234: sales brochur...
Start time: Tuesday, 29 March 2011 2:34 PM
Subject
Due in
Scheduled call to Example Contact at 0 0011 1 613 555 ...
Now
Dismiss All
Open Item
Dismiss
Click Snooze to be reminded again in:
5 minutes
Snooze

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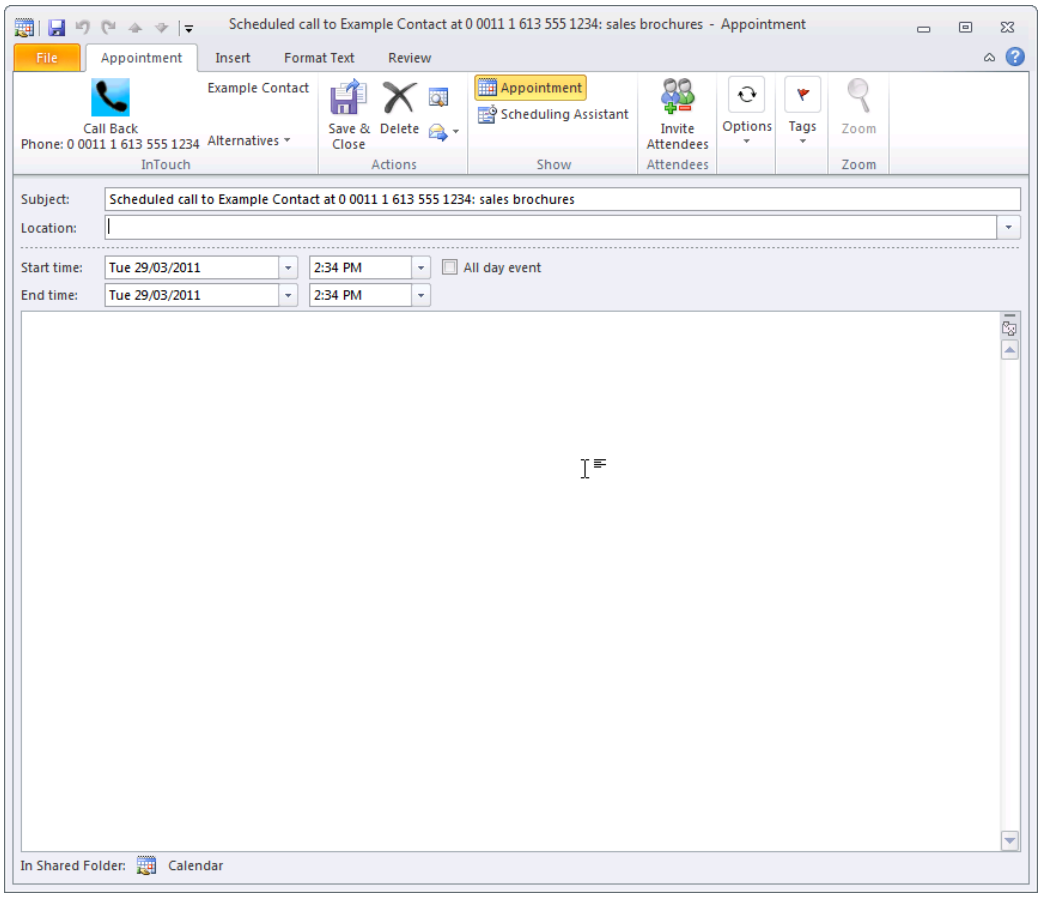
Double clicking on the reminder will display the reminder as a normal Outlook appointment with the addition of the ***InTouch*** toolbar (Outlook 2003) or Ribbon (Outlook 2007 & 2010)



The contact can be called from here or an alternate method of contact can be chosen, based on any presence indicators that might be available.

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7.3 Pounce

To activate the Pounce feature, Right Click on a contact in ***InTouch*** Panel who has Presence indicators in an unavailable state (see below) e.g. On the Phone and Select "Pounce"

- Phone: anything other than Idle
- Outlook: anything other than Free
- MSN: Anything other than Online
- Skype: anything other than Online or Skype Me
- Yahoo!: Anything other than Online

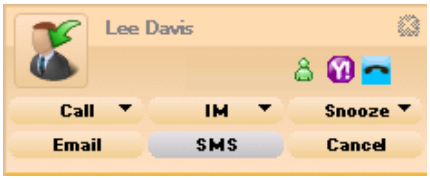
To Cancel a Pounce feature, Right Click on a contact in ***InTouch*** Panel who has Presence indicators in an unavailable state e.g. On the Phone and Select "Pounce" again.

An active Pounce is indicated by displaying the contact as highlighted in the ***InTouch*** panel and with a tick next to the "Pounce" item in the Right Click Menu of the contact.

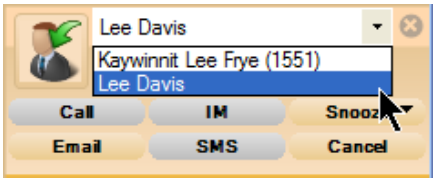
The Pounce Feature will be triggered when any of the Contacts' presence indicators become available as below.

Phone	Idle
Outlook/Calender	Free
Skype	Available
Yahoo!	Available
MSN	Available

When the Pounce is triggered, the ***InTouch*** User will be presented with the following screen.



Multiple Pounce Notifications appear as a single window with a drop down list of all the contacts.



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The Pounce window will display Presence indicators for the current contact along with Menu's that will allow the ***InTouch*** Users to communicate (i.e. Call, IM, Email & SMS) with the given contact.

The ***InTouch*** User will have an option to Snooze the Pounce Notification for 5, 10, 15 or 30 minutes; "Cancel" to cancel the currently selected Pounce Notification, or "Cancel All" to cancel all the Pounce Notifications.

Note: Pounces do not persist across Outlook Restarts

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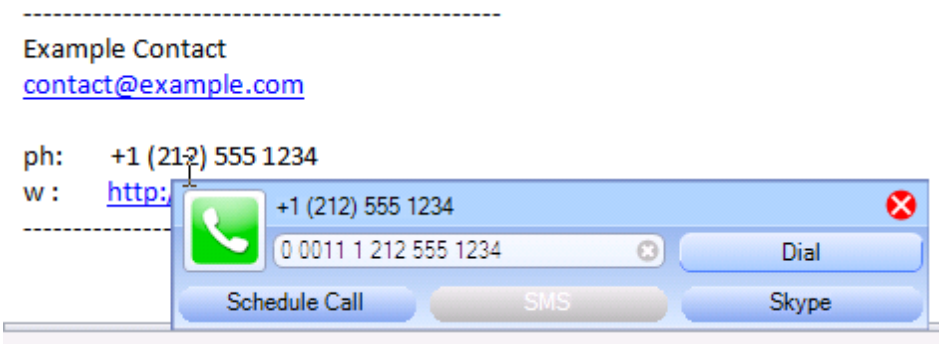
7.4 Intelligent Quickdial (IQ)

Intelligent Quickdial (IQ) allows you to select and dial almost any number displayed on screen (e.g. webpage, document, PDF, picture, email signature, etc...) via a combination of a button press and mouse click. The default combination is <Ctrl> and <Right click>. However this can be customized within ***InTouch*** Options



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7.5 Calls

7.5.1 Making Calls

To make a call you have a number of choices.

- Double click on the required number after expanding the Entry in your "Prime Contacts"
- Enter the required number in the dial box and click on "Dial" button
- Right click on an email and select the required phone number as displayed
- Click "Dial" from a call-back reminder screen pop
- Do a search and click on the required number after expanding the Entry.
- Scroll down the entries in the directory under the "Prime Contacts" and click on the required number after expanding the Entry

Should an outgoing call fail the call popup will automatically be dismissed when the call is terminated.

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7.5.2 Call Window functions

Answer
Only available for incoming, ringing calls. Will answer the call at the user's handset in speakerphone or a headset as appropriate. Pressing the answer key while there is another connected call will place that call on hold before answering this call.

Hang up
Only available when the call is connected or an outgoing call has not yet been answered. Will hang up on the call.

Hold
Only available for connected calls. Will place the call on hold. Will change to an Unhold button when the call is held.

Unhold
Only available for held calls. Unholds the given call. Pressing the unhold key while there is another connected call will place that call on hold before unholding this call.

Skype
Only available If the contact has one or more Skype contacts associated and the user is running Skype. The Skype button will start text chat with the contact.

Yahoo!
Only available If the contact has one or more Yahoo! contacts associated and the user is running Yahoo!. The Yahoo! button will start text chat with the contact.

MSN
Only available If the contact has one or more MSN contacts associated and the user is running MSN. The MSN button will start text chat with the contact.

SMS
Only available If the contact has one or more Cellphone numbers associated. The SMS button will start a new SMS message to the contact.

Email
Only available if the contact has an email address associated with them. Start a new email message to the first email address found for the contact

Call back
Only available if the contact has a phone number associated – i.e. not available for an incoming call with Caller ID Blocked.
Will allow the user to specify when to schedule the callback reminder and to enter a subject for the reminder

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7.5.3 Call Window Errors

Should any call handling function fail a message may be displayed to the user. The error message will include an interpretation of the TAPI error code.

Failure Scenarios are:

- User invoked
  - Answer
  - Hold
  - Unhold
  - Hang up
  - Make Call
    - From toolbar
      - Set Call Forward
      - Clear Call Forward
      - Toggle Do not Disturb

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7.6 Editing the Phone Number

Editing the Phone Number

InTouch allows the user to edit the phone number dialing behavior to overcome:

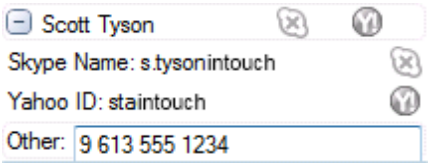
- o Configurations where Private dialing plan length which is equal to the PSTN digit length.
- o Configurations where both intra-company and regular local external dialing plan had 7 digits.
- o Configuration with intra-company of X digits, but having an access code which is different depending on the routes required (8xxxx for PRI calls and 7xxxx for IP calls).
- o Configurations where private dialing contacts have been entered in Outlook Address Books.

As an example, where intra-company length 7 and prefix 6, area code 613 and 613 is included for 10 digit dialing. The user that enters a private dialing number 3937913 will see (613) added by Outlook in front of 3937913. the ***InTouch*** user has to edit the ***InTouch*** contact to replace 9 613 393 7913 with 63937913.

The ***InTouch*** user must manually change settings in Control Panel-> Phone and Modem Options for:

- o Configurations where intra-company dialing prefix is used for long distance calls instead of the external outgoing call prefix.
- o Areas where Area code rules are required to dial numbers within the an area code.

The user will edit the phone number in-situ similar to the following:



These editable "Dialled as" fields will only accept numbers, * and # and spaces; No attempt will be made to allow the user to enter phonewords such as "555 CALL" and convert it to "555 2255"

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7.7 Instant Message

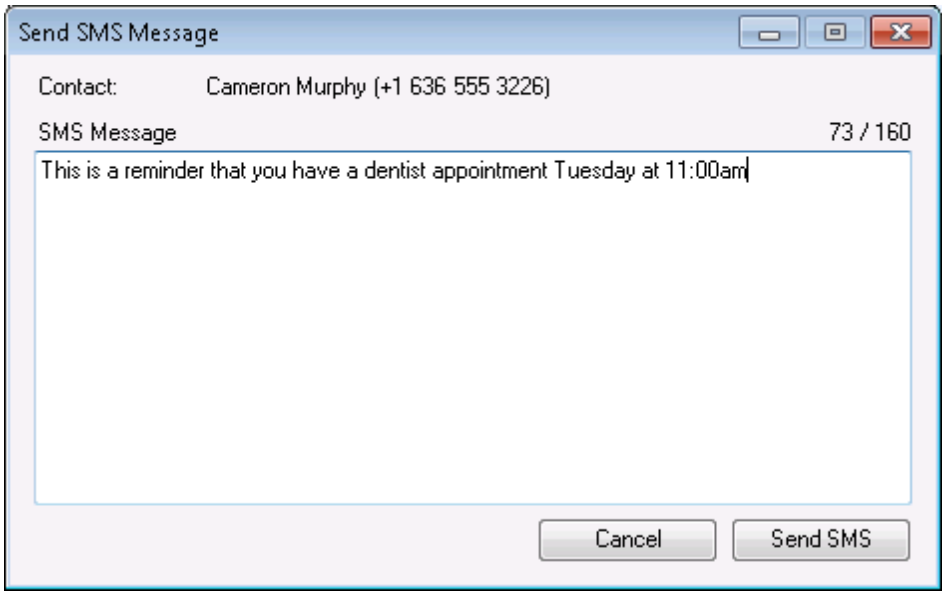
InTouch does not incorporate Instant Messaging functions directly within itself. Instead, users can initiate an instant messaging chat session using Skype, Yahoo! or MSN (as appropriate) by way of the ***InTouch*** context menus and/or ***InTouch*** toolbars for contacts that have an associated Skype, Yahoo! or MSN account.

i.e. by right-clicking on a Contact who has an associated Skype identity, then selecting "Chat: <Skype identity>", ***InTouch*** will trigger a new Skype chat session using the Skype User Interface. Likewise, the same behavior applies to Yahoo! contacts using the Yahoo! User Interface and MSN contacts using the MSN User Interface.

7.8 SMS

- SMS is achieved by sending an email to an SMS service provider. (SMS service settings are configured by the administrator as part of the pre configuration)
- Only available for contacts with cellphone numbers.
- Sent SMS messages will appear in the "Sent Items" folder of your email client.

  Note: Some SMS service providers may reply with an email confirmation. You or your system administrator will need to contact your SMS service provider if do not require this confirmation. All SMS service providers have different features and functionality available, please contact your SMS service provider for further information as to supported features.



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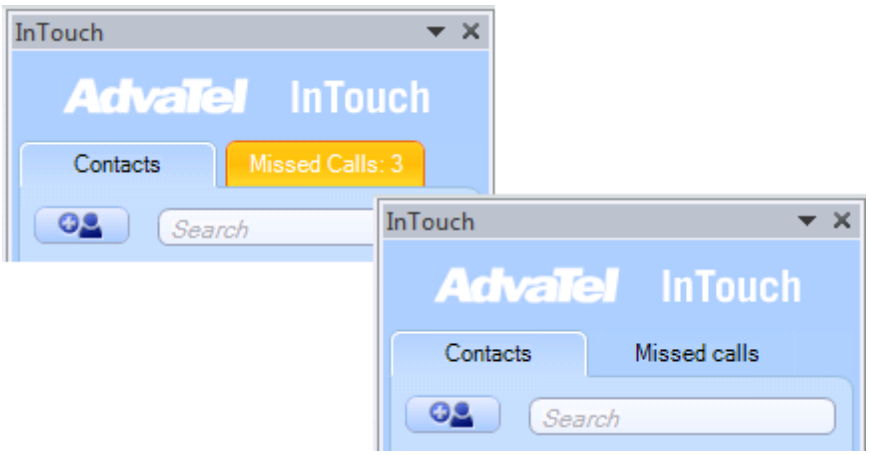
7.9 Missed Calls



At the top of the ***InTouch*** Panel there is a "Missed Calls" tab. If there the user has missed any calls whilst ***InTouch*** has been running, then the tab will be highlighted in an orange color and the number of missed calls will be shown in the tab's caption. E.g. "Missed Calls: 3". Clicking on the tab will display a list of the missed call/s, including a time stamp and phone number (if presented to the extension). If a missed call is received from a number matching a contact, the contacts details will also be displayed. The number of missed calls presented on the Missed Calls tab, reflects the number of calls that have been missed, since the user last viewed the Missed Calls list.

A right click on a missed call entry will reveal other data known about the caller. E.g. phone number, e-mail address etc. Double clicking on the missed number will initiate a call to the number the call was missed from.

Note: Missed calls are only logged while ***InTouch*** is running. Calls made by the user and calls answered by the user i.e. not missed, are not logged.

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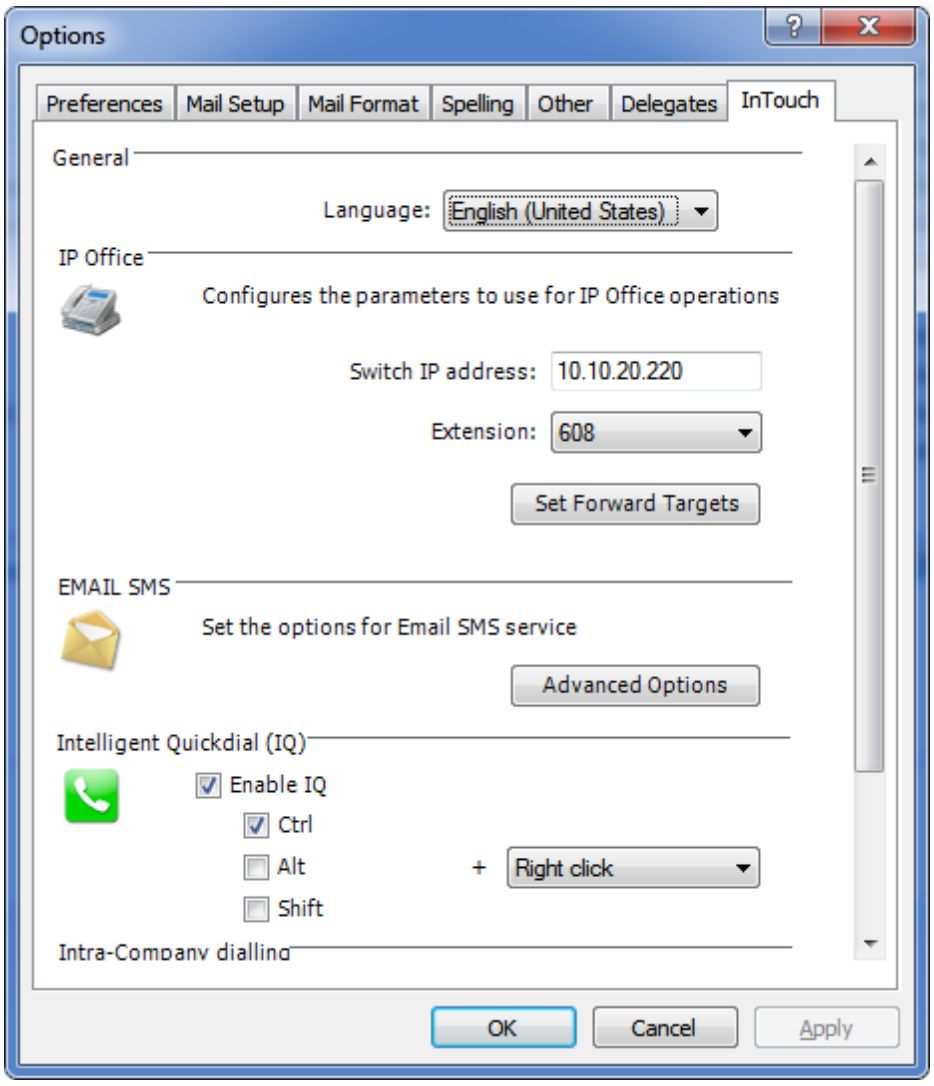
7.10 InTouch Options

Outlook 2003 & 2007

Tools > Options > ***InTouch*** Options (Tab)



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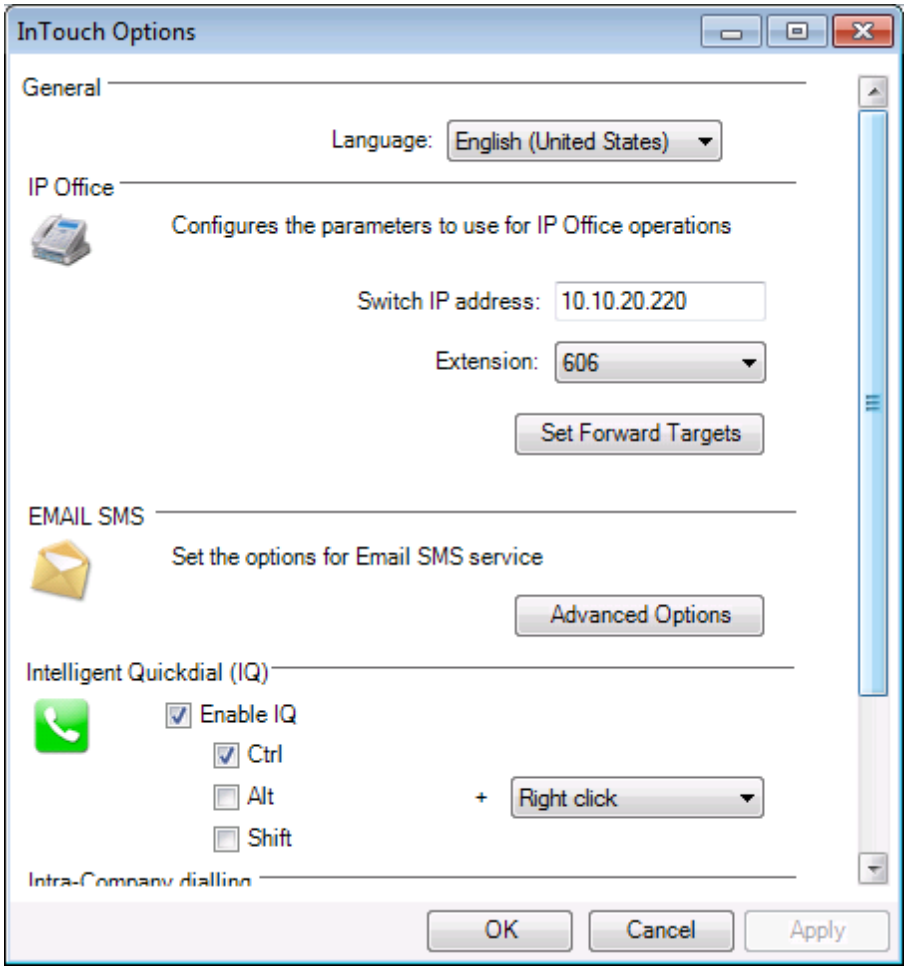
Outlook 2010

File (Tab) > ***InTouch*** Options
Or, by clicking on the "Show ***InTouch*** Options" button in the bottom right corner of the ***InTouch*** Ribbon (Home Tab)



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Language

Allows the user to change the language of the ***InTouch*** Components.

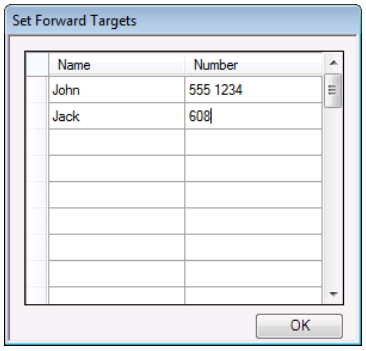
The languages available are detailed in Supported Languages Section.

IP Office

Switch IP Address: Sets the IP Address of the IP Office

Extension: Sets the Directory Number that ***InTouch*** should use for call control. Changes to this setting will be effective when the user clicks OK and this setting is persistent across restarts of Outlook/ ***InTouch***.

Set Forward Targets button:



Allows the user to configure names & numbers for setting Call Forward using the "Forward To…" button on the main ***InTouch*** toolbar. The Names and Numbers configured here will be listed in the "Forward to…" menu of the main ***InTouch*** toolbar.

Users can add up to 49 forward targets. An additional item is added to the end of the user configured forward targets – "Forward to other…" that allows the user to enter an arbitrary number.

There is no validation on the numbers entered in this list, however, numbers that do not appear to be extensions will be translated to a diallable address prior to setting call forward. i. e. the number will be prefixed with the External Dial Digit.

Note: any configuration on the IP Office for allowed/disallowed call forward settings will override these call forward actions. E.g. if a user/extension is configured such that setting call forward to external numbers is disallowed, clicking on a "Forward to <external number>" item will have no effect.

EMAIL SMS

Advanced Options:

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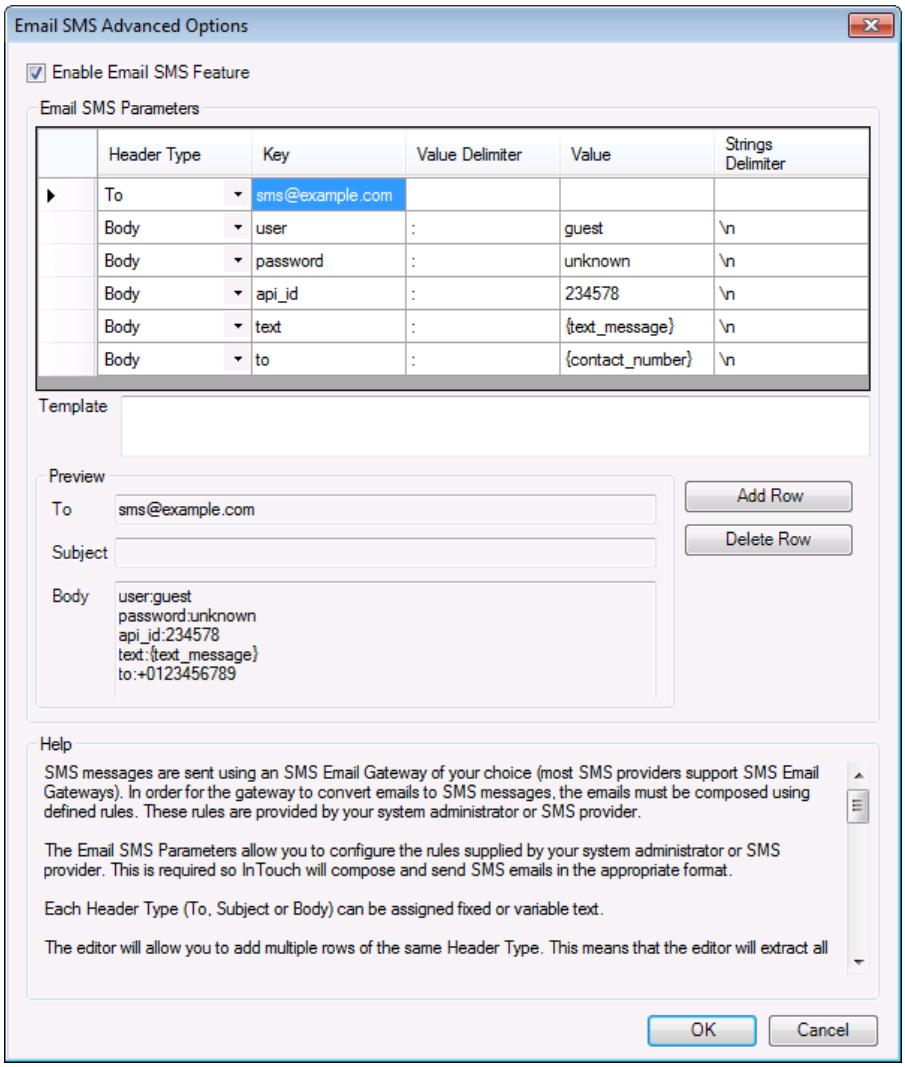

"Enable Email SMS Feature" checkbox, enables or disables the SMS option within ***InTouch***.

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Email SMS Parameters allows the user to configure the rules supplied by the system administrator or SMS provider. This is required so ***InTouch*** will compose and send SMS emails in the appropriate format.

Each Header Type (To, Subject or Body) can be assigned fixed or variable text.

The editor will allows the user to add multiple rows of the same Header Type. This means that the editor will extract all text lines defined in the multiple grid rows, and concatenate these text lines to form a single text block.

The Email SMS Parameters editor allows for built in variables, which should be entered inside curly brackets { }
For Example:
{contact_number}
{message_text}

When an SMS email is composed, the variable fields will be replaced with the contact cell number and SMS text.

Template - Free text can be added to the SMS template that will be displayed by default when selecting the SMS option from a contact within ***InTouch***. This text can be appended and/or deleted from within the SMS message dialog when creating and sending an SMS.

IMPORTANT! The "Preview" box will be updated as you change the "Email SMS Parameters" grid. This way you can always see what you have configured and what will be sent to the SMS gateway.

IQ

"Enable IQ" checkbox, enable or disable the Intelligent Quickdial (IQ) feature within ***InTouch*** (Enabled by default)
Options available enable the user to customize how ***InTouch*** IQ is to be invoked by a combination of key press and mouse click.

Key press options: (at least one key option is required)
- <Ctrl>
- <Alt>
- <Shift>

Mouse click options:
- Left click (single)
- Middle click (single)
- Right click (single)
- Left double click
- Middle double click
- Right double click

Default setting - <Ctrl> + <Right Click>

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Intra-Company Dialing

Enable Intra-Company dialing: Enables or disables Intra-Company Dialing for the user
Intra-Company number length: Phone numbers with fewer digits than the specified length will be dialled as an internal number while Phone numbers which match the specified length will be dialled with the intra-company prefix. The Intra-company phone number length must be larger than internal extensions.
Intra-Company dialing Prefix: Allows the user to specify Intra-Company dialing Prefix which will be used for Intra-Company Dialing.
By default:

- Phone numbers with fewer digits than the specified length will be dialled as an internal number.
- Phone numbers which match the specified length will be dialled with the intra-company prefix.
- Phone numbers which exceed the specified length will be passed to the Windows TAPI translation function to be prepared for dialing. Basic configuration of TAPI can be done using the ***InTouch*** configuration wizard. More complex dialling rules will need to be managed manually.

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7.11 Supported Languages

InTouch supports the following languages:

- English (United States)
- Dutch (Netherlands)
- French (France)
- German (Germany)
- Italian (Italy)
- Portuguese (Portugal)
- Spanish (Spain)

Language selection can be made at installation, or at any time from ***InTouch*** Options

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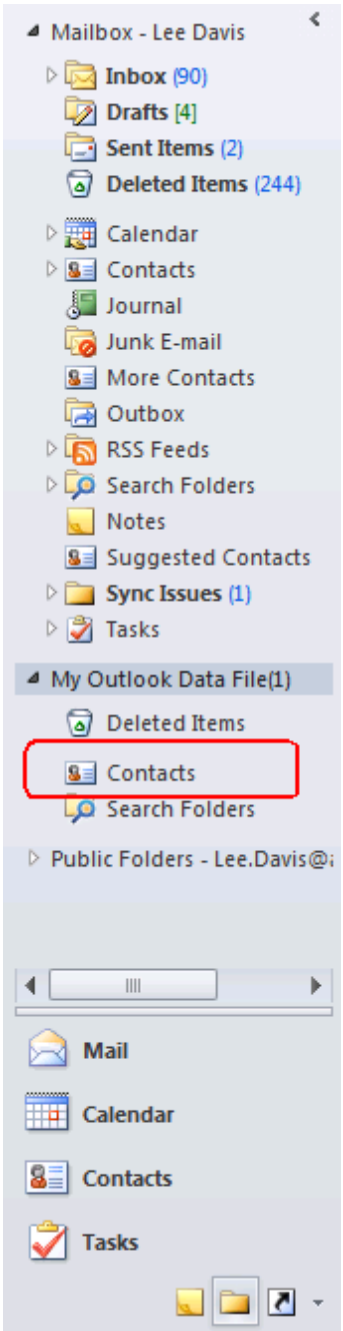
8 Appendix A: Adding a contact folder to the Outlook Address Book

To add a folder to the Outlook Address Book:

1) Find the folder to add in the folder list:



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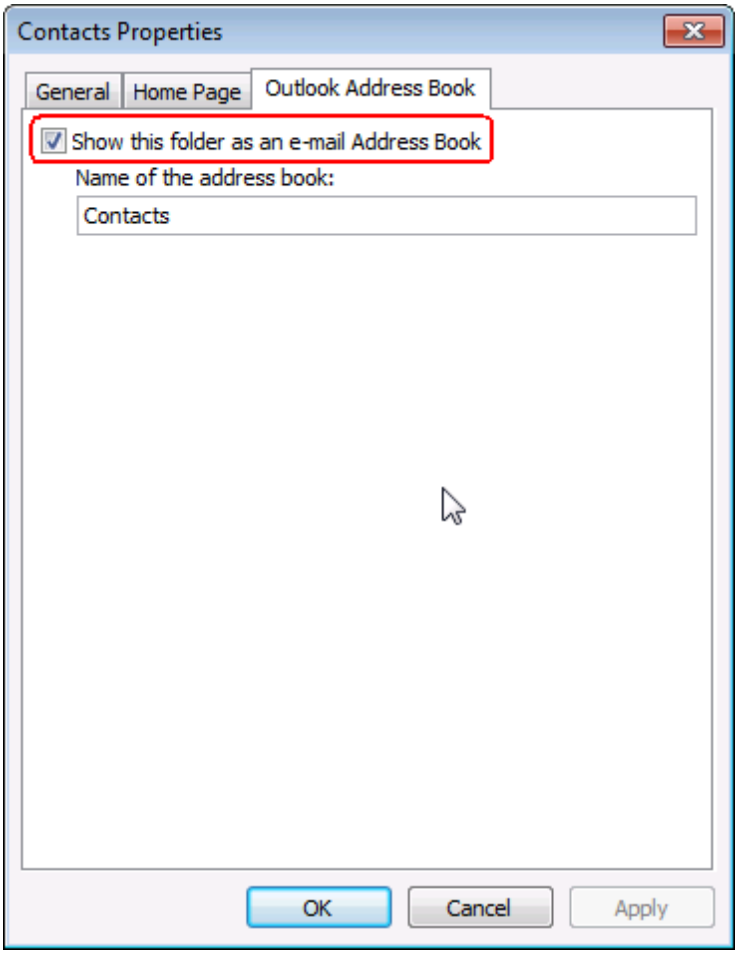
2) Right click and select Properties

   Or

   Click on the folder then navigate to the File menu and select Folder->Properties for <folder name>

3) Select the "Outlook Address Book" tab



4) Check the "Show this folder as an e-mail Address Book" and click OK

The check-box can be cleared if a folder is no longer wanted in the Address Book.

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